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SUGAR REPORTS

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CONTENTS

		PAGES
1.	MARKET REVIEW	2 - 7
2.	GOVERNMENT AND THE SUGAR MARKET - Address delivered by Lawrence Myers, Director, Sugar Division	8 - 15
3.	U. S. WATERBORNE MOVEMENTS OF SUGAR IN 1955	15 - 22
4.	ADMINISTRATIVE ACTIONS	22
5.	STATISTICAL SERIES	23 - 32
	(a) Highlights	23
	(b) Receipts and meltings January-February 1957; deliveries by primary distributors March, January-March, and stocks at selected dates, 1957 and 1956	24 - 27
	(c) Status of quotas as of March 31 and April 12, 1957, and comparison of charges to quotas January-March 1957 and 1956	28 - 30
	(d) Deliveries by primary distributors by States February 1957	31
	(e) Sugar prices by areas, and refined sugar production and stocks	32

AGRICULTURE - WASHINGTON

MARKET REVIEW

Distribution for United States consumption through April 13, 1957 totalled 2,024,000 tons or 200,000 tons less than at the same time last year. Deliveries during the first two weeks of April slightly exceeded those of last year, which may portend the seasonal upturn in demand. The unseasonable spring weather probably has been responsible for a decrease in use by some sugar consuming industries. However, the principal cause for the lower delivery rate through March appears to be reversal in the year-end build-up of invisible stocks which had occurred in some areas.

Although refiners receipts of raw sugar through March 1957 were about 100,000 tons less than during the same period last year their stocks of both raw and refined sugar were higher on March 31 than in any of the five previous years.

The spot price of domestic raw sugar at New York averaged 6.18 cents per pound during the first half of April and 6.20 for the year to date or .29 cent above the 1956 average through mid-April. The wholesale refined sugar price at New York has been 9.10 cents per pound during the year to date or .45 cent above the 8.65 cents price in 1956.

In the Northeast territory where the 9.10 cents per pound has prevailed since December 1, 1956, deliveries to New England and Middle Atlantic states showed little decrease during the first two months of 1957 as compared to 1956. Although national distribution for this period was off 10 percent, deliveries to those states were down less than 2 percent. Territories where year end inventory build-ups occurred registered decreased receipts during January and February; the North Central states were off 20 percent, Far West 11 percent, and the Southern states 8 percent.

Quoted prices of refined sugar are unchanged in all territories but trade reports indicate that Gulf refineries have made substantial price concessions in the Chicago-West territory. Cane sugar is reported as being sold at 8.45 cents per pound in this territory and beet sugar prices have been shaded to reflect a .10 to .15 cent differential from the cane sugar price where offered. It will be recalled that cane sugar deliveries in the North Central states, particularly Illinois, were high during the first half of 1956. (Sugar Reports No. 52, page 3). During the first two months of

1957, beet sugar deliveries in the North Central territory were 42 percent of the total as compared with 36 percent last year. Most of the increase is due to the larger proportion of beet sugar deliveries to Illinois. During January-February 1957, beet sugar deliveries to that state were 52 percent of the total as against 39 percent last year. There were 50,000 more bags of beet sugar reported as delivered to Illinois during this period than during the corresponding period of 1956 and a reduction of 592,000 bags of cane sugar. In addition, beet sugar constructive deliveries of 160,000 bags to the North Central states were reported in 1956 but physically delivered this year. About half of this sugar went to Illinois. Constructive deliveries in the previous year were a negligible quantity.

Puerto Rican production through March of this year is reported to be about 512,000 tons or 60,000 tons less than last year at the same time. Production during March was at the same level as last year but early production was curtailed because of prolonged negotiations of some mills with unions. Fifty percent of the 1956 crop and fifty-six percent of the 1955 crop were produced by the end of March. However, during the five preceding crops (1950-54) January-March production averaged 518,000 tons or 41 percent of the average crop year production of 1,257,000 tons.

Puerto Rican stocks at the beginning of 1957 were only about 43,000 tons or 90,000 tons below those of January 1, 1956 and as previously stated, early production was about 60,000 tons less than in 1956. Charges against the Puerto Rican quota through March showed a decline of 100,000 tons from last year for the same period but were only slightly below the level of the two previous years.

On April 10, the Cuban Sugar Stabilization Institute sold the Soviet Union 150,000 tons of raw sugar at 6.12 cents per pound, a price 3 points below the world spot quotation of the New York Coffee and Sugar Exchange on that and the preceding day. Cuban mills were accorded the opportunity to participate in supplying sugar for this transaction within their share of the free world quota. Any tonnage not supplied within the regular free world quota is to be supplied from production in excess of 5,150,000 Spanish long tons and if sufficient excess production does not become available, it was announced that any balance would be borrowed from the Financed Reserve earmarked for United States requirements in 1958.

The likelihood that any portion of the tonnage for the Soviet sale would be taken from the Financed Reserve is slight. Cuban sugar production through April 15, 1957 was 4,432,000 Spanish long tons. In the postwar years, 1946 through 1952, before Cuban sugar production was restricted, not more than 80 percent of the total crop was produced prior to April 16 in any year. In recent years of restricted production, larger percentages of the total sugar crop were produced before April 16. However, if the recoverable sugar content of high-test molasses produced late in the season is considered, production before April 16 was between 65 and 80 percent of the total in every year since 1946 and between 73 and 76 percent of the total in six of those eleven years. Production before April 16 made up the smallest proportion of the total in 1947 (65 percent) and in 1952 (66 percent). In 1952 late season production was boosted by the grinding of sugarcane planted in the spring of the preceding year. The same appears to have happened in 1947. According to the Cuban Mill Owners Association, 118,000 acres of sugarcane were planted in the spring of 1956. That acreage should be available for cutting before the end of the present campaign and should result in sugar production of well over 200,000 Spanish long tons.

Production through April 15 amounts to 86 percent of the 5,150,000 Spanish long ton original production goal which was set before restrictions were removed and it amounts to 83 percent of the 5,366,000 ton production forecast of a leading trade house made earlier in April before most recent production data became available. Even before the April 15 production total of 4,432,000 tons was announced, Cuban Minister Amadeo Lopez Castro stated that 1957 sugar production would exceed 5,150,000 tons.

Cuban sugar production after April 15 amounted to at least 1,035,000 Spanish long tons in every year during the past decade, provided the recoverable sugar content of high-test molasses produced late in the season during the past three years is included; in five of the last seven years about 1.3 million Spanish long tons of sugar were produced after April 15.

Cuban sales to the world market have just passed the 2,000,000 ton mark, 78 percent of the 2,566,623 Spanish long tons authorized for such sale. Between 150,000 and 180,000 tons of the remainder would be needed to replace 1956 borrowings from the United States reserve, if production does not exceed 5,150,000 tons. However, it is now apparent that Cuban sugar production will exceed that figure by at least the tonnage indicated.

Other exporters to the world free market have sold smaller proportions of their estimated 1956 export supplies, according to trade reports. The Dominican Republic and China (Taiwan) have sold about 425,000 metric tons each or 55 percent of their supplies, including 200,000 tons of Chinese sugar to be supplied to Japan. While the negotiations for this transaction have not been completed, it is understood that for all practical purposes the tonnage must be considered committed.

Only about 678,000 metric tons or 32 percent of the 2,136,000 tons estimated by the International Sugar Council to be supplied by other primary exporters have been reported sold. For all primary exporters, 3.6 out of 6.3 million tons or 57 percent have been reported sold, even though reports show that relatively small quantities of Cuban sugar remain uncommitted. Altogether 2.7 million tons would appear still uncommitted, including about 350,000 tons of East European beet sugar supplies from the 1957 fall crop. The availability in full of these latter supplies must be regarded as doubtful. However, the overall estimate of 6.3 million tons of world free market supplies in 1957 neglects fall production in the following countries: Argentina, Brazil, Denmark, and Turkey; that production could significantly contribute to total available 1957 export supplies. Moreover, the 6.3 million ton estimate allows only 200,000 tons from Italy and 100,000 tons from India. Exports from these two countries could easily exceed the allowance by 200,000 tons.

Indeed, F. O. Licht recently estimated available supplies at 6,524,000 metric tons, raw value, about 200,000 tons more than the International Sugar Council estimate released on March 6. Licht's principal additions are 100,000 tons and 50,000 tons, respectively, from Brazil's and East Germany's fall production and about 50,000 tons each from Cuba, the Dominican Republic and Italy. However, Licht assumes that Indonesia and the British Commonwealth will have less sugar available than assumed under the 6.3 million ton supply estimate.

On the requirements side Licht's April 4 estimate exceeds the International Sugar Council's March 6 figures by 400,000 tons and amounts to 6,050,000 tons. Licht's principal additons are: 153,000 tons for the Commonwealth, 112,000 tons for France, 108,000 tons for other European countries (primarily Germany (F.R.), the Netherlands, and Finland) and 50,000 tons for the Soviet Union.

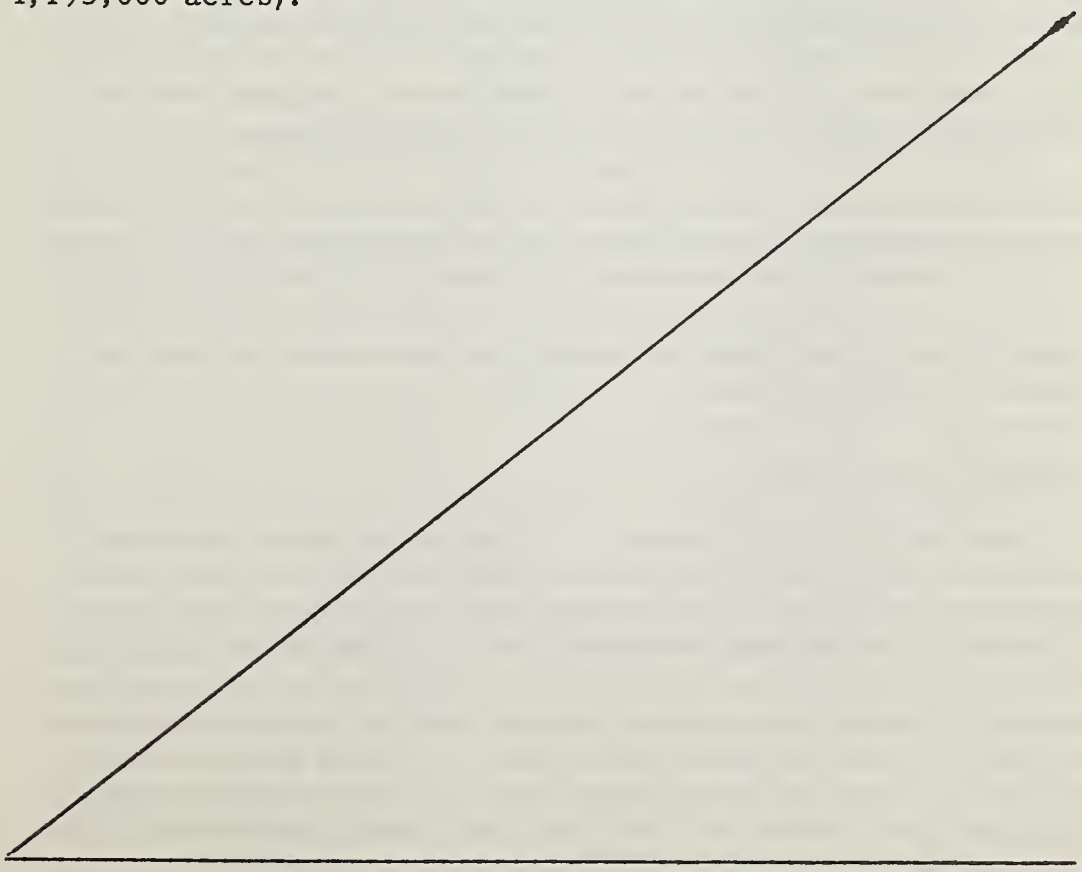
The United Kingdom, France, Germany, the Netherlands and Finland had relatively low visible stocks at the beginning of this year. All these countries distributed much larger tonnages of sugar in 1956 than in 1955 so that they may have built up invisible stocks. Licht's requirements estimate would permit the return of visible stocks to normal levels without any reduction in invisible stocks.

The Soviet Union has so far purchased 425,000 metric tons, raw value - 361,000 tons from Cuba and 64,000 tons from the United Kingdom. Assuming that about 200,000 tons will be exported from the U.S.S.R. as usual, 225,000 tons of net Soviet imports remain. This may be regarded as compensation for the tonnage which Poland is unable to supply to the U.S.S.R. A continued interest of the U.S.S.R. in world market sugar was evidenced on April 11 when that country expressed an interest in an additional 50,000 tons of Cuban sugar at 6.12 cents a pound, a price at which Cuba would not sell. This additional interest might be considered as compensation for reduced supplies from Czechoslovakia although the U.S.S.R. has stated that it will not release Czechoslovakia from her sugar supply contract. In spite of the compensatory aspects of the Soviet sugar purchases during the past two months, these purchases came as a surprise in view of earlier Soviet Government announcements giving calendar year 1956 sugar production as 4,733,000 tons and crop year 1956 sugar production as 4,778,000 metric tons, raw value, 1,017,000 and 979,000 tons, more than 1955 calendar and crop year production, respectively.

On the other hand, the Russian journal, "Sugar Beet," refers to difficult weather conditions in the sugar beet areas. It reports sugar beet yields per hectare in the Russian Soviet Federal Republic higher than in 1955 but goes on to say that in the country as a whole (which includes the Ukraine, the Soviet Union's leading beet area) fewer beets were harvested on the average per hectare than in 1955. Soviet area under beets in 1956 has been placed as 2,000,000 to 2,020,000 hectares (4,942,000 to 4,991,000 acres) by various sources, a 14 or 15 percent increase over 1955. Another Russian journal, "Sugar Industry," reports lower sucrose content than in 1955. With an area increase of not more than 15 percent, a decline in beet yields per hectare, and a decline in sucrose content, it is unlikely that a 26 percent increase in sugar production and the 4,778,000 ton Soviet production figure could have been achieved.

U.S.S.R. sugar consumption in 1955 is estimated at 3,950,000 tons, in 1956 at 4,200,000. If we start with the Soviet sugar production figure of 4,778,000 tons and add only estimated net imports of 225,000 tons, without any further allowance for Czechoslovakian or additional world free market imports, 5.0 million tons of sugar would be available for consumption in 1957, a 19 percent increase over 1956. Since it now appears that the unfavorable European weather last year also affected the U.S.S.R. it seems reasonable to assume a more modest increase in Soviet 1956 production and 1957 consumption over the preceding years.

For 1957 Licht reports that the U.S.S.R. is planning a 150,000 hectare or 7.5 percent increase in 1957 over the 2,000,000 hectares (5.0 million acres) planted to sugar beets in 1956. In addition to this impressive increase, the smaller East European Communist countries are expected to plant 1,123,000 hectares compared to 1,081,000 hectares last year, a 3.9 percent increase. Western European beet acreage is expected to rise by only 1.8 percent from 1,667,000 to 1,697,000 hectares (4,119,000 to 4,193,000 acres).



GOVERNMENT AND THE SUGAR MARKET

Address delivered
by
Lawrence Myers, Director, Sugar Division
Before the Sugar Club of New York, April 22, 1957

It is a privilege to be permitted again to address you gentlemen who operate this nerve center of the World Sugar Trade. Some weeks ago, when my friend Joe Elvove invited me, I assumed that by the time I would talk to you this year's sugar situation would have unfolded and that in large part I would be able to discuss the year in retrospect. However, both Dame Nature and world buyers have been slow at disclosing their secrets. Possibly some of you already know the climax and ending of this year's sugar story; certainly I do not. In seeking light on the problems, I have observed that many who are in a position to know most about the market are most modest as to their ability to forecast. In fact, I might add that the confidence individuals exhibit in their own analyses and forecasts of this year's developments appear to be about proportional to their distance from the market.

That completes my discussion of the future of supply, demand and prices, and so let us turn to some other subjects.

It seems to me that three points merit discussion: First, quota management problems resulting from revisions in the Sugar Act; second, the administrative actions taken as a result of changes in the supply and demand situation since last summer; and third, some of the ground rules necessary for the successful administration of the Sugar Act.

Changes in the Sugar Act.

We now have a revised Sugar Act. True, the basic elements of the legislation remain the same as before but there have been significant changes. The changes in the legislation that are of interest to most of you gentlemen are the changes in the quota mechanism. At present and higher levels of domestic requirements all domestic areas participate in filling the increased quotas and the full duty countries participate to a much greater extent than ever before. Participation of the domestic areas in supplying increased requirements is not new, but it was reinstituted last

year for the first time since the war. The greatly enlarged participation in quota increases by full duty countries is both new and significant.

Before I take up this matter, however, let me touch on two related matters.

From time to time question has been raised as to whether the revised quota provisions of the Sugar Act can be administered successfully. Definitely I think they can be, although this necessitates full recognition by both Government and industry of the changes that have been made.

Second, I think it is worth while to review how the quota mechanism operates seasonally and geographically. Under the Sugar Act all quotas apply to the calendar year as a whole or to the part that remains after the quota is established or revised. Therefore, a quota can be filled at any time after it is established within the calendar year to which it applies. Exact requirements cannot be determined until the end of the year.

In every year except 1951 since the Sugar Act of 1948 has been in effect, we have had short supplies on the east coast at the year end. Year-end shortages are not of concern in the West because of stocks of Hawaiian sugar and the seasonal peak of beet sugar supplies. Neither are year-end shortages of concern in the South because of the mainland cane harvest. When quotas are too small the shortage is felt in the Northeast. This will be true to an even greater degree in the future than it has been in the past.

In the past, as you know, we have tended particularly to keep our controls on the low side during the early part of the year. There were five reasons for this: First, our uncertainty as to the year's final requirements; second, the fact that demand is usually low during the early weeks of a calendar year; third, the Caribbean crops tend to weigh heavily on the market during the harvest season; fourth, it is desirable to avoid the many technical difficulties that are involved when quotas are reduced late in the year; and fifth, it was the purpose of the Department to keep quotas small enough so that sugar would sell in the domestic market at a significant premium over prices prevailing in the world market.

A collateral aspect of this policy appears to have led to misunderstandings at times, even here in New York. If we start out with too low an estimate it is a mathematical necessity that quotas will

be increased during the course of the year. So far as possible the Department attempts to make the additional supplies available during the season of heavy distribution or at other times when there is evidence that the market has a demand for additional quantities of sugar. Although I think there is universal agreement that this should be the objective for timing quota increases, the quota actions have been interpreted as efforts to bear the market. I think you refiners and brokers could perform a real public service by making a study with recommendations on this problem before our hearing on 1958 requirements. Just how impressed are you and your customers with beginning estimates that the whole world knows must be increased? How surprised are you when the inevitable increases subsequently are made? These questions, you will observe, do not involve adjustments for unanticipated changes in demand but merely the issue of initial estimates that are distinctly below a conservative appraisal of the year's requirements.

Heretofore, it was a rather safe and simple practice to wait until late in the year before making the final quantities available so long as we could dip into a huge Cuban surplus that could be shipped quickly to this country and pinpointed into the area of need. Currently the Cuban surplus does not exist and supplies made available under present quota increases are diffused.

That brings me back to the changes brought about by the revised legislation. Under the amended Act, 55 percent of increased requirements are supplied by the domestic areas and 45 percent by foreign areas. Cuba, that formerly supplied 96 percent of such increases, will now supply approximately 30 percent and full duty countries as a group will supply 15 percent. Of the domestic suppliers, Puerto Rico, which ships to the east coast, will supply 13 percent. If all of these areas are able to fill promptly any additional quotas that might be supplied to them late in the season, the east coast would get 58 percent of any late season increase in the consumption estimate. Under such conditions, if the Northeast should require an additional 50,000 tons of sugar late in the year, a quota increase of 90,000 tons should supply it to them. The remaining 40,000 tons would, of course, be marketed by producers in the South and West.

However, the Puerto Rican industry has indicated that it will have a deficit this year. In such case, any increase in its quota would be reallocated to the other domestic areas. This would restrict

supplies to the Northeast to the 45 percent that would come from Cuba and the full duty countries. On this basis it would require an increase of 110,000 tons in the total estimate to make 50,000 tons available to the Northeast. From a 110,000-ton quota increase Peru, the Dominican Republic and Mexico would each obtain a quota increase of roughly 5,000 short tons which would be a shippable quantity if the sugar were assembled and a small ship or part cargo space were readily available. The one percent increase that is divided among the various other full duty suppliers could be filled only in the event their supplies were already in this country.

It is obvious that the lack of readily available supplies or bottoms might further reduce the quantity that could be shipped to the Northeast under a particular quota increase. If, to make an exaggerated assumption for a point of emphasis, Cuba alone could be counted upon for the additional supplies, it would require a total increase of 170,000 tons in the consumption estimate to make 50,000 tons available to the Northeast. Of such total the 25,000-ton increase in the quota for full duty countries would, according to our assumption, be unfilled at the end of the year and 95,000 tons would be marketed by our domestic areas outside the Northeast. Over a short period it is doubtful that the larger sales in other areas would relieve the shortage in the Northeast.

At this point I should like to observe that Cuba, the Dominican Republic, Mexico, and Peru have each given us assurances that they will fill their quotas, regardless of how much the world price may exceed our domestic price. It is assumed that these commitments will be met despite the strong demand and favorable prices in the world market and despite recent sales by the Cuban Sugar Stabilization Institute.

The above examples should indicate the nature of the changes in the quota mechanism of the Sugar Act. It is always a mistake to assume that there is a particular formula which can be followed successfully from year to year in administering any such program as our quota controls. It would be particularly unfortunate to assume that either the Government or the industry can operate in exactly the same way under our present legislation that they have in the past. The Department of Agriculture, the refiners in the Northeast, and the refiners and beet processors in other parts of the country must all adjust to the new legislation.

I have already emphasized that tardy quota actions might necessitate larger increases in total quotas than would otherwise be

required in order to provide needed supplies for the Northeast and I have emphasized that such actions might result in the dumping of unneeded supplies onto the markets of the South and the West. It would be a mistake, however, to assume that the recognition of such facts will make it possible for the Government to act in the suggested manner. If refiners undertake to treat each available lot of sugar as a distressed cargo and all quota supplies as surpluses, they will force the Government into ever tighter controls. Even more important, the major factor in determining whether or not particular quotas are adequate probably will be the marketing practices of the beet and Hawaiian industries. Unless they supply their normal trade territories consistently throughout the year they will create a vacuum that will be filled by other off-shore and foreign supplies. The supplies thus lost to the east coast can be replaced only through enlarged total marketing quotas.

From all this I trust it has become clear that the Government in administering the Sugar Act undertakes in great part simply to respond to the actions of others. Whether quotas prove to be adequate or inadequate, prompt or tardy, depends upon the composite actions of buyers and sellers throughout the country.

Quota Actions.

Starting late last July evidence developed of a rather persistent demand for raw sugar. Later came responses to the threats of the east coast shipping strike and to the sharp price increases in the world market. As a result of the rising demand, total quotas were increased gradually to 9,000,000 tons. I shall not undertake to repeat the many dire forecasts that were heard each time the Department responded to the ground swell of demand for more sugar. I must point out, however, that the entire 9,000,000 tons were marketed and charged to quotas and that the trend of domestic prices continued upward with the monthly average price for December being the highest for the year.

My purpose in referring to last fall's developments is to illustrate the fact that for purposes of quota control it is immaterial whether increased demand reflects larger immediate consumption, purchases for stockpiling, or the replacement of sugar that has been marketed outside its customary trade territory. Our task is to respond to the market. We must not fight it.

As we came to 1957 it was apparent that the Cuban surplus had disappeared, that world supplies were tight, and that world prices were strong and might, under the proper provocation, become explosive. These facts and possible dangers did much to shape our actions. We could properly call upon our foreign suppliers to fill their U. S. quotas at stable prices since they normally receive a substantial premium on quantities sold in our market. However, we could not in fairness ask foreign suppliers to protect us by withholding unnecessarily huge quantities from a hungry world market if we, ourselves, were indifferent about our needs. The first essential, therefore, was to establish quotas at a level that would be as close as possible to the final requirement. As you will recall we set the 1957 total quota at 8,800,000 tons in December and raised it to 9,000,000 tons in January when there appeared to be a further tightening in the situation.

Next to the assuring of adequate supplies came the maintenance of stability in the domestic market, despite the wild fluctuations and sharp rises in the world market. For the time being, it may be said that we have called a moratorium on considerations of higher prices in the domestic market. This has caused some in our producer group to be unhappy. Once it appears that the market has passed its peak the price discussions will break out again with renewed vigor. The response that has come from consumers throughout the nation since the New York press publicized one proposed march on Washington suggests that the price discussions, when resumed, may be carried on vigorously by both sides. In the meantime we ask only that the calm may continue on the domestic front.

Ground Rules.

In referring to ground rules I have no intention of becoming encyclopedic. I hope that mention of the subject and a few observations will be suggestive of a more adequate train of thought.

The Sugar Act program has been characterized as the most effective of all of our agricultural programs. Certainly it is vital to our producers of sugarcane and sugar beets and to the associated processors. Furthermore, through its protection for refiners it is the only agricultural program I know that extends its benefits to all parts of the producing and processing industry it serves. Also, the Sugar Act program is the only program that directly and intentionally passes on to our foreign suppliers most of the benefits of our protected domestic market.

These benefits bring responsibilities as well as privileges to all of our suppliers. The program has been sold to the Congress and to the American public in part as an insurance policy under which American consumers pay premiums for sugar in normal years in order to have the protection of assured supplies at stable prices during periods of shortage or inflation in the world market. All of our suppliers can feel proud that the stabilization effort worked so successfully in 1950 and 1951 and to date in 1957. It is the strongest argument I know for continuing the program.

By and large the Sugar Act has operated as intended. This has been possible because the leaders in the various branches of the domestic sugar industry have supported administrative actions looking toward the long-time stability of their industry. By and large we have also had the effective support of our major foreign suppliers.

Although the record of support has been excellent, there have been some discordant notes and moments of anxiety. At times proposals have been made for achieving short term gains at the risk of discrediting and possibly destroying the whole program. In view of all that is at stake, it is rather shocking that any interested party would be willing to place the program in jeopardy. It should be the responsibility of the industry to protect the program from its own mischievous proposals.

During the past year fears have been expressed with respect to our foreign supplies. Earlier this had also been of concern to the Congress and when the Sugar Act was last up Section 202(e) was written into the Act to provide for a reduction in future quotas of any foreign country that fails by more than 10 percent to fill its U. S. quota in a year when world prices are above domestic prices. Recent sales by the Cuban Sugar Stabilization Institute without a clear explanation of where the sugar is to come from has led to renewed questions. It is to be hoped that the source of the sugar will soon be disclosed. In the meantime we must rest on the record of Cuba's past performances and its assurances that it will continue to protect supplies for the U. S. market.

Although the Sugar Act is a tremendously effective instrument for benefiting the sugar industry, it cannot solve all of the industry's problems.

As I have emphasized repeatedly, the Sugar Act can afford no alternative to efficient production. Fortunately the domestic

industry has some of the most efficient producers in the world. These producers must act as pace setters for our industry.

Neither can the Sugar Act become a substitute for effective marketing. Why in sugar one of the chemically identical twins should alwasy sell at a discount under the other is a long-standing mystery. However, when the Chicago basis price, incorporating various allowances and discounts, is below any seaboard basis, as at present, it raises fundamental questions as to the entire price structure for sugar. Certainly the resulting discount in grower returns cannot fairly be attributed to any administrative action under the Sugar Act.

The Sugar Act has freed our major sugar supplying industry, foreign and domestic, from its historic status under which long periods of depression and insolvency were interrupted by brief periods of prosperity. One of these was the three-month period referred to as "The Dance of the Millions". If our domestic and foreign suppliers were willing to forego the benefits of the Sugar Act they would be free also, of course, to press all advantages to the hilt. However, so long as the industry accepts the benefits of the Act, it must also accept the inherent restrictions. Most emphatically, the industry must be conservative about pressing the advantages, either as sellers or as buyers, that result from the Sugar Act and its regulations. With this I return to the theme: The successful adminstration of the revised Sugar Act will be dependent primarily upon the moderation and self-policing of the sugar industry.

U.S. WATERBORNE MOVEMENTS OF SUGAR IN 1955

by
Otto Rauchschwalbe
Sugar Division

Large volumes of refined sugar find their way from refineries to distant markets on barges and self-propelled vessels on the inland waterways. For example, about one-third of all the refined sugar shipped out of the State of Louisiana moves up the Mississippi and tributaries, amounting to 424 thousand tons in 1955 or almost as much sugar as is produced from all the cane grown in the state.

Details of this method of sugar transport are available from data collected by the Department of the Army, Corps of Engineers. This information indicates that postwar developments are

restricted to directional flows convenient to established marketing territories. Important influencing factors include relative cost and service characteristics. No attempt is made to compare the trends in water transport of sugar with the total movement of sugar by various forms of transport, although the figures below suggest that the uptrend of sugar transport on the Mississippi is somewhat greater than the trend of total out-of-state movements from Louisiana. U. S. movements of sugar by rail and motor carriers are to be evaluated in a forthcoming issue of Sugar Reports.

Inland waterborne freight is defined as traffic on internal waterways of the United States (using the rivers and intracoastal waterways) and excludes traffic of the Gulf or coastwise traffic on the oceans and traffic from or within the territories. While the volume of such traffic in sugar is important, it is less than one-half of 1 percent of the total volume of all waterborne commerce as noted below for the years 1947 to 1955 inclusive:

	Inland Waterborne Traffic*	
	Sugar	Total Commerce
	(1,000 tons)	
1947	593	262,300
1948	685	283,600
1949	817	268,300
1950	848	297,700
1951	841	325,400
1952	928	320,600
1953	952	327,600
1954	844	319,800
1955	845	362,600

*Includes internal, local and intraport traffic; and excludes coastwise, Great Lakes, imports, exports, and shipping from or within the territories. Local and intraport traffic of sugar accounted for about two-fifths of the total sugar traffic.

Traffic in sugar increased from 593 thousand tons in 1947 to a high of 952 thousand tons in 1953. Traffic for 1955 was somewhat lower, but was still 43 percent greater than 1947 as compared with an increase of 38 percent in total inland waterborne commerce which reached a high of 362.6 million tons in the same year.

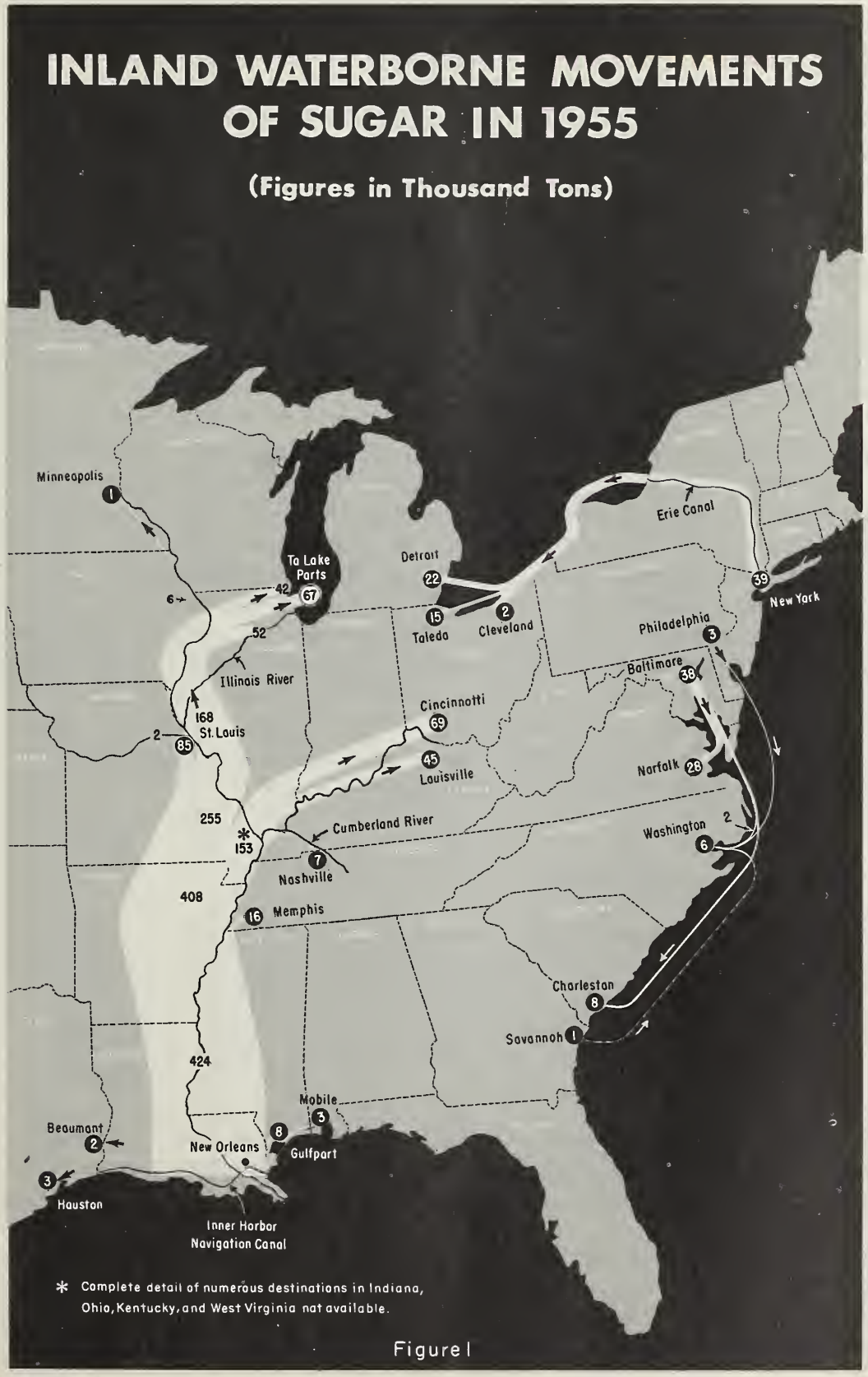


Figure I

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Sugar entering waterborne commerce in inland waterways of the United States is mainly of crystalline refined type enroute to market on the longest leg of the journey from refineries. It also includes some sugar for direct consumption other than refined, a small percentage of raws, and a substantial quantity of liquid refined sugar. By far the most important movement originates from the refineries scattered in the delta country of Louisiana, and moves upward to harbors on the Mississippi and Ohio River system. Secondary origins include the New York district with movements up the Hudson and west through the Great Lakes; and the Baltimore and Philadelphia districts with movements to the south mostly through the intracoastal waterway to Virginia, North Carolina, and South Carolina.

Except for certain harbor shuttle movements, water transport is mainly devoted to the hauling of large shipments over long distances. Although distant sugar shipments from Louisiana were off in 1955 from 1953, this decline is related to a general constriction of the marketing territory for Louisiana refineries for that year and is not necessarily a significant departure from the long-time upward trend in the volume of movements. This is illustrated by the fact that the total sugar movement by all forms of transport from Louisiana to Illinois alone was 424.7 thousand tons in 1953, 385.1 thousand in 1955, and up to 453.4 in 1956. Available data on sugar shipments from Louisiana by method of transport may be summarized as follows in thousands of tons:

	1953	1955
Out-of-State shipments:		
By waterborne carriers	518	432
By rail	634	558
By motor carrier	161	355
Total	1,313	1,345

The increased importance of shipments to nearby states by motor carrier in 1955 more than offset the reduced long hauls by both water and rail transport.

The most important out-of-state destination for sugar refined in Louisiana is Chicago. The water route up the Mississippi is by way of the Illinois waterway, which includes the Illinois River, the Chicago Drainage Canal and the South Branch of the Chicago

River leading into Lake Michigan. Quantities received in the Chicago District in 1955 totalled 161 thousand tons compared with 199 thousand tons in 1953. Of the quantities received in 1955, a total of 52 thousand tons was unloaded on the Drainage Canal, 42 thousand tons on the Chicago River, and 67 thousand tons at nearby ports of Lake Michigan reached through the Chicago River.

The movements and volumes of sugar traffic in waterborne commerce in 1955 are shown on the chart for the eastern half of the United States. The most distant movements roughly outline the limits of the Gulf marketing territory. Small quantities reach as far as Kansas to the west by way of the Missouri River, Minnesota to the north, and West Virginia and Ohio to the east by way of the Ohio River. Southern deliveries include points in east Texas, Mississippi, Alabama, and Tennessee. The bulk of the movement is received at St. Louis (85 thousand tons), Chicago district (161 thousand tons), and the Louisville-Cincinnati district (114 thousand tons). Final destinations of these quantities as well as other unloads at many other points enroute are not known because unloads are often transshipped by rail and motor carrier, but usually for relatively short distances. Very little sugar in this traffic originates outside of Louisiana, except for some one thousand tons shipped southward on the Mississippi from St. Louis.

In Table 1 it is possible to note specific effects of the decline in long haul sugar movements from Louisiana by water from 1953 to 1955 by principal routes and destinations. Practically all of the important long hauls were curtailed in 1955, but record movements will undoubtedly occur in 1956.

The inland water route from the New York district is up the Hudson River and west through the Erie Canal and Great Lakes to Cleveland, Toledo and Detroit, accounting for almost all of the 39,000 ton movement in 1955. This is considerably greater than the 22,000 tons involved in 1953. Most of this quantity consists of liquid sugar by tank ship and barges, some for redistribution by both rail and motor carriers.

About 38 thousand tons of sugar is shipped southward by vessel from Baltimore by way of the Chesapeake Bay mostly to Norfolk and vicinity, although nearly 3 thousand tons moves to points in North Carolina and 8 thousand tons to Charleston, South Carolina. About 3 thousand tons uses the Delaware River from Philadelphia to Virginia and North Carolina ports. Another quantity of about 1

Table 1.- Selected destinations of inland barge movements of sugar from Louisiana

(short tons)

Route and destination	1953	1955
Via Mississippi River		
Memphis, Tenn. district	16,778 1/	15,694
St. Louis, Mo. district	124,389 2/	84,925
Minneapolis, Minn. district	5,089 3/	1,280
Via Miss. River & Illinois Waterway		
Chicago district and other Lake Michigan ports	188,541	162,088
Via Miss. River & Cumberland River		
Nashville, Tenn. district	9,799	6,976
Via Miss. River & Ohio River		
Louisville, Ky.	157,313	44,776
Cincinnati, Ohio		69,326
Via Innerharbor Navigation Canal		
Mobile, Ala. district	6,639	3,162
Houston, Texas	948	3,291 4/

1/ Includes a small volume of receipts on the Mississippi River above Baton Rouge, La. to the mouth of the Ohio River.

2/ Includes a small volume of receipts on the Mississippi River from the mouth of the Ohio River to the mouth of the Missouri River.

3/ Includes an unknown volume of receipts at points along the Mississippi River above the mouth of the Missouri River.

4/ Multiple origin may include Sugarland, Texas.

Source: Department of the Army, Corps of Engineers

thousand tons moves coastwise to the north from Savannah, Georgia to the Pamlico and Tar River section of North Carolina.

Other miscellaneous uses of the waterways include shipments of at least 2 thousand tons from Seattle, Washington to Seward Harbor, Alaska. A very heavy harbor shuttle movement of 260 thousand tons occurs in the San Francisco Bay area where sugar is loaded at the refinery on barges and moved across the Bay to San Francisco, or unloaded on to railroad cars at Oakland or Richmond for distant shipments to the south and east. Substantial intraport movements are also found in other harbors, especially in the New York City district.

Water transport services are economical and adaptable to long distance movement of large volumes of sugar in both dry and liquid form. Although both self-propelled vessels and barges are used on the westbound route from New York, most other movements involve towed barges which usually carry payloads of 500 to 1200 tons. Barges of the covered hopper with weathertight hatch covers or liquid cargo type are used for this purpose.

Freight rates are generally half to three-quarters of the rate established for other forms of transport. Rates often include a wide range of services, such as drayage, storage and truck delivery. Loading and unloading services may also be included in the rate, since these are performed by permanent or portable cranes and derricks of the barge line.

Barge rates and services may be illustrated by tariff #50 on file with the Interstate Commerce Commission and currently effective for the haul from New Orleans, Louisiana to Chicago, Illinois. Without giving detailed provisions, the services involved in three such rates for a minimum of 500 tons might be summarized as follows:

Rate cents per cwt.	Service
37.25	F.O.B. barge at New Orleans to F.O.B. barge at Chicago. No loading or unloading services.
63.70	Includes loading into barges at New Orleans to the extent of 50 cents per net ton, and similar allowance if performed by shipper; also unloading on to floor of dock at Chicago.

(continued)

Rate cents per cwt. (ctd)	Service
66.45	Includes loading services in New Orleans up to a cost of $1.00 per net ton, and unloading into trucks or cars in Chicago, rail switching charges, and customer door delivery anywhere in the greater Chicago area. Equivalent allowances are made for such services if performed by shipper or receiver.

The established rail rate for this haul is 83 cents per cwt.

Although barges are not the quickest form of transport, their flexibility is a distinct advantage to the distribution of sugar. The increase of volumes of direct consumption sugar to market via water carriers utilizes an economical form of transport for the most important leg in the long trek from refineries to consumption centers, and tends to offset part of the rising cost of shipping sugar.

ADMINISTRATIVE ACTIONS

Date announced	Administrative action
April 8, 1957	Public hearing announced on Florida sugarcane wage rates for the period from July 1, 1957 through June 30, 1958, and on prices for the 1957 sugarcane crop. The hearing will begin at 10 a.m., May 9, 1957 in the Sugarland Park Auditorium, Clewiston, Florida. To qualify for payments under the Sugar Act of 1948, as amended, producers must pay all persons employed in producing, cultivating, or harvesting sugar wage rates not less than those determined as fair and reasonable by the Secretary of Agriculture after public hearing and investigation. Producers who process sugarcane grown by others must pay prices for it also determined as fair and reasonable by the Secretary.

STATISTICAL SERIES IN THIS ISSUE

HIGHLIGHTS

1. March deliveries of sugar for continental U. S. consumption, 608,000 short tons, raw value, (preliminary), down 13.1 percent from March 1956. Final data on February deliveries 537,000 short tons; the previously published preliminary figure for that month was 532,000 tons.

2. Primary distributors' stocks March 30, 1957, 1,793,000 short tons, raw value (preliminary), down 16,000 tons from February 28, 1957 but up 30,000 tons from a year ago. During March, beet processors' stocks decreased 122,000 tons and mainland cane processors' stocks 15,000 tons; refiners' stocks increased 97,000 tons and importers' of direct-consumption sugar 24,000 tons. Beet processors' stocks up 41,000 tons, and refiners' stocks 16,000 tons from same time last year but mainland cane processors' stocks and importers' stocks down about 24,000 and 2,000 tons, respectively.

3. Charges to quotas in first quarter, 2,077,000 short tons, raw value, down 223,000 tons or 9.7 percent from same period last year. Among the major supplying areas only the Philippines had an increase.

4. Sugar deliveries during February were down in all five regions as compared with February 1956. These declines were sharper in all but the New England region than the year to year declines for January, the largest reductions being 21.1, and 18.6 percent, respectively, in deliveries to the North Central and Western regions. The New England and Middle Atlantic regions had moderate declines of approximately 2.5 percent. As compared with January deliveries of sugar during February were down 16.3 percent to the Southern, 12.7 percent to the Western, 6.6 percent to the Middle Atlantic and 1.7 percent to the North Central region; deliveries to the New England region were up 1.7 percent.

Table 2.-Distribution of sugar by primary distributors in the continental United States, Puerto Rico, and Hawaii during January-February 1957 and 1956

	1957 (Short tons, raw value)	1956 (Short tons, raw value)
Continental United States		
Refiners' raw	189	824
Refiners' refined	835,337	913,015
Beet processors' refined	213,849	258,913
Importers' direct consumption	67,945	90,536
Mainland sugarcane processors' direct-consumption	11,531 1/	30,818
Total	1,128,851	1,294,106
Deliveries for export, livestock feed, etc.	7,079 2/	48,255
For continental consumption 3/	1,121,772	1,245,851
Puerto Rico	14,590	11,778
Hawaii	3,827	4,843

1/ Deliveries for direct-consumption by mainland sugarcane processors that acquire no raw sugar from others for refining; deliveries by mainland sugarcane processor-refiners are included in deliveries by refiners.

2/ Ex-quota deliveries

	Export	Feed	Total
Refiners' raw	0	0	0
Refiners' refined	6,325	29	6,354
Beet processors	141	0	141
Importers	364	214	578
Mainland sugarcane processors	0	6	6
Total	6,830	249	7,079

3/ Includes deliveries for United States military forces at home and abroad.

Table 3.-Stocks of sugar held by primary distributors in the continental United States, February 28, 1957 and February 29, 1956

	1957 (Short tons, raw value)	1956 (Short tons, raw value)
Refiners' raw	224,632	272,870
Refiners' refined	281,260	288,141
Beet processors' refined	1,178,378	1,145,121
Importers' direct consumption	36,399	37,485
Mainland sugarcane processors	88,236*	118,263
Total	1,808,905	1,861,880

* Stocks of sugar of mainland sugarcane processors that acquire no raw sugar from others for refining; processor-refiner stocks are included in refiners' stocks.

Table 4.-Raw sugar: Refiners' stocks, receipts, meltings and deliveries January-February 1957

	(short tons, raw value)
Stocks, January 1, 1957	256,271
Receipts	857,330
Meltings	887,884
Deliveries for direct consumption	189
Deliveries for export and livestock feed	-
Gains and (losses), adjustments, etc.	(896)
Stocks, February 28, 1957	224,632

* For receipts by source of supply, see Table 9.

Source: Compiled from reports on Form SU-73 and 74

Table 5. -Refined sugar: Refiners' and beet processors' stocks, production and deliveries, January-February 1957

	Cane sugar	Beet sugar
Stocks, January 1, 1957	235,993*	1,278,178
Production from raws melted	880,431	-
Production direct from cane or beets	-	114,106
Imported refined receipts	1,899	-
Deliveries for continental consumption	828,983	213,708
Deliveries for export and livestock feed	6,354	141
Gains and (losses), adjustments, etc.	(1,726)	(57)
Stocks, February 28, 1957	281,260	1,178,378

* Revised mainland cane operations of former mainland sugarcane processor-refiner now included in Table 7.

Source: Compiled from reports on Form SU-73, SU-74 and SU-70 from cane sugar refiners and beet sugar processors, respectively.

Table 6. -Direct-consumption sugar: Importers' stocks, receipts and deliveries, January-February, 1957 1/

	(short tons, raw value)
Stocks, January 1, 1957	11,255
Receipts	93,095
Deliveries for continental consumption	67,367
Deliveries for export and livestock feed	578
Gains and (losses), adjustments, etc.	(6)
Stocks, February 28, 1957	36,399

1/ For receipt by source of supply, see Table 9.

Source: Compiled from reports on Form SU-75 from importers of direct-consumption sugar.

Table 7.-Mainland sugarcane processors: Stocks, production and deliveries of mainland cane sugar, January-February, 1957

		(short tons, raw value
Stocks, January 1, 1957		125,250 *
Production		54,484
Deliveries:		
For further processing	79,606	
For direct consumption	11,525	
For export and livestock feed	6	
Total		91,137
Gains and(losses), adjustments, etc.		(361)
Stocks, February 28, 1957		88,236

* Revised mainland sugarcane operations of former mainland sugarcane processor-refiner now included in this table.

Source: Compiled from reports submitted by mainland sugarcane processors.

Table 8. Mainland sugar: Production and allotment charges January-February 1957

	Cane sugar	Beet sugar
Production	54,123	114,084
Allotment charges		
Louisiana sugarcane processors:		
For further processing	83,692	
For direct-consumption	9,433	
Louisiana processor-refiners	28,523	
Florida sugarcane processors	41,812	
Beet processors	-	213,688
Total	163,460	

Source: Compiled from reports submitted by mainland sugarcane processors, processor-refiners, and beet processors on Forms SU-71, 72, 73, and SU-70.

Table 9.-Refiners and importers: Receipts by source of supply, January-February, 1957

Source of supply	Refiners (raw sugar)	Importers 1/ (DC sugar)
	(short tons, raw value)	
Cuba	484,979	80,573
Hawaii	38,604	0
Hawaii refined	1,899 2/	0
Mainland cane area	78,974	
Philippines, Republic of the	204,856	1,753
Puerto Rico	49,566	3,594
Virgin Islands	0	0
Other countries	0	7,175
Not identifiable	351	0
Total	859,229	93,095
For further processing	857,330	0

1/ Includes quota exempt sugar for livestock feed, 214 tons, and for reexport, 128 tons. 2/ Refined sugar imported by refiners.

Table 10-Distribution of sugar by primary distributors in the continental United States, March and January-March, 1957 and 1956

	1957 1/		1956	
	Mar.	Jan.-Mar.	Mar.	Jan.-Mar.
	(short tons, raw value)			
Refiners	431,703	1,267,229	489,761	1,403,600
Beet processors	126,898	340,747	145,341	404,254
Importers	46,638	114,583	70,065	160,601
Mainland sugarcane processors	2,500 2/	14,031	11,388	42,206
Total	607,739	1,736,590	716,555	2,010,661
Deliveries for export, livestock feed, etc.	-	7,079	17,390	65,645
For continental consumption 3/	607,739	1,729,511	699,165	1,945,016

1/ Preliminary

2/ Estimated

3/ Includes deliveries for U. S. military forces at home and abroad.

Table 11-Stocks of sugar held by primary distributors in the continental United States, March 30, 1957 and March 31, 1956

	1957 1/	1956
	(short tons, raw value)	
Refiners' raw	297,692	291,252
Refiners' refined	304,873	295,436
Beet processors	1,056,218	1,015,247
Importers' direct-consumption	60,842	63,183
Mainland sugarcane processors	73,000 2/	97,268
Total	1,792,625	1,762,386

1/ Preliminary

2/ Not available; estimated

Table 12.-Status of 1957 Sugar Quotas as of March 31, 1957 1/

Areas	Quota	Credit for drawback of duty	Charge to quota & offset to drawback of duty 2/ Total	Charge to quota & offset to drawback of duty 2/ Direct consumption from offshore areas 3/	Unfilled balance Total	Unfilled balance Within direct consumption limits for offshore areas
	Short tons, raw value					
Domestic beet	1,953,952		341,059 4/		1,612,893	
Mainland cane	601,250		196,860 4/		404,390	
Hawaii	1,090,496		125,183	6,104	965,313	24,596
Puerto Rico	1,140,253		176,601	21,811	963,652	111,253
Virgin Islands	15,549		0		15,549	
Republic of the Philippines	980,000	0	338,646	3,949	641,354	55,971
Cuba	3,001,295	1,067	877,103	142,174	2,125,259	232,949
Other foreign countries	217,205	183	22,043	15,379	195,349	49,554
Total	9,000,000	1,250	2,077,495	189,417	6,923,759	474,323
Details of other foreign countries						
Peru	78,207	116	9,901	3,321	68,422	6,242
Dominican Republic	61,657	30	1,919	1,919	59,768	6,618
Mexico	44,409	35	0	0	44,444	15,504
Nicaragua	11,731	0	3,931	3,931	7,800	6,277
Haiti	6,179	2	0	0	6,181	6,179
Netherlands	3,453	0	3,204	3,204	249	249
China	3,386	0	1,906	1,906	1,480	1,480
Panama	3,386	0	0	0	3,386	3,386
Costa Rica	3,381	0	0	0	3,381	3,381
Canada	631	0	579	579	52	52
United Kingdom	516	0	512	512	4	4
Belgium	182	0	0	0	182	182
British Guiana	84	0	84	0	0	0
Hong Kong	3	0	7	7	0 5/	0
Total	217,205	183	22,043 6/	15,379	195,349	49,554
LIQUID SUGAR 7/						
	(wine gallons of 72 percent total sugar content)					
Cuba	7,970,558		4,809,269		3,161,289	
Dominican Republic	830,894		2,244		828,650	
British West Indies	300,000		0		300,000	

1/ 428 tons quota exempt sugar entered for livestock feed use and 320 tons for reexport from Cuba under Section 212 (4). 2/ These data include the following: (a) Domestic beet and mainland cane estimated; (b) raw sugar from Hawaii and all sugar from the Republic of the Philippines and Cuba entered through March 31, 1957 as shown by quota clearance papers received in the Sugar Division by April 12, 1957; and (c) direct-consumption sugar from Hawaii, and all sugar from Puerto Rico, the Virgin Islands and "other foreign countries" entered or certified for entry as of March 31, 1957. 3/ Includes raw sugar for direct-consumption from Cuba, 4,887; Philippines, 43; Puerto Rico, 10; Total, 4,940. 4/ Partly estimated. 5/ Applications being held pending availability of quota for Hong Kong, total 6 tons.

6/ Under Section 212 (1), charges to quotas exclude the first 10 tons entered by each country listed and also by Dutch Guiana and Venezuela. In addition, 10 tons were entered by Canada under Section 212 (2).

7/ 3,703 gallons entered by United Kingdom under Section 212 (3)

Table 13.-Comparison of charges to quotas and offsets to drawback of duty
January - March 1957 and 1956

(short tons, raw value and percentages)

Area	1957 Tons	1956 Tons	Increase Tons	Increase Percent	Decrease Tons	Decrease Percent
Domestic beet	341,059 1/	378,534			37,475	9.9
Mainland cane	196,860 1/	245,217 2/			48,357	19.7
Hawaii	125,183	133,966			8,783	6.6
Puerto Rico	176,601	276,676			100,075	36.2
Virgin Islands	0	0				
Republic of the Philippines	338,646	328,464	10,182	3.1		
Cuba	877,103	895,137			18,034	2.0
Other foreign countries	22,043	42,610			20,567	48.3
Total	2,077,495	2,300,604			223,109	9.7
Details of other foreign countries						
Peru	9,901	10,875			974	9.0
Dominican Republic	1,919	13,197			11,278	85.5
Mexico	0	12,057			12,057	
Nicaragua	3,931	632	3,299	522.0		
Haiti	0	0				
Netherlands	3,204	1,108	2,096	189.2		
China	1,906	1,170	736	62.9		
Panama	0	0				
Costa Rica	0	1,089			1,089	
Canada	579	1,054			475	45.1
United Kingdom	512	0	512			
Belgium	0	241			241	
British Guiana	84	0	84			
Hong Kong	7	1	6			
Colombia	0 3/	1,154			1,154	
Denmark	0 3/	32			32	
Total	22,043	42,610			20,567	48.3

1/ Estimated in part

2/ Revised

3/ These countries have no quota under effective Sugar Act.

LIQUID SUGAR

(wine gallons of 72 percent total sugar content)

Cuba	4,809,269	4,283,221	526,048	12.3
Dominican Republic	2,244	0	2,244	
British West Indies	0	0		

Table 14-Status of 1957 Sugar Quotas as of April 12, 1957 1/

Areas	Quota	Credit for drawback of duty	Charge to quota & offset to drawback of duty 2/ Total	Charge to quota & offset to drawback of duty 2/ Direct consumption from offshore areas 3/	Unfilled balance Total	Unfilled balance Within direct consumption limits for offshore areas
	Short tons, raw value					
Domestic beet	1,953,952		398,598 4/		1,555,354	
Mainland cane	601,250		227,460 4/		373,790	
Hawaii	1,090,496		125,183	6,104	965,313	24,596
Puerto Rico	1,140,253		216,324	28,516	923,929	104,548
Virgin Islands	15,549		0		15,549	
Republic of the Philippines	980,000		375,736	3,949	604,264	55,971
Cuba	3,001,295	1,067	922,696	153,868	2,079,666	221,255
Other foreign countries	217,205	183	23,113	16,449	194,279	48,484
Total	9,000,000	1,250	2,289,110	208,886	6,712,144	454,854
Details of other foreign countries						
Peru	78,207	116	9,901	3,321	68,422	6,242
Dominican Republic	61,657	30	1,919	1,919	59,768	6,618
Mexico	44,409	35	0	0	44,444	15,504
Nicaragua	11,731	0	5,001	5,001	6,730	5,207
Haiti	6,179	2	0	0	6,181	6,179
Netherlands	3,453	0	3,204	3,204	249	249
China	3,386	0	1,906	1,906	1,480	1,480
Panama	3,386	0	0	0	3,386	3,386
Costa Rica	3,381	0	0	0	3,381	3,381
Canada	631	0	579	579	52	52
United Kingdom	516	0	512	512	4	4
Belgium	182	0	0	0	182	182
British Guiana	84	0	84	0	0	0
Hong Kong	3	0	7	7	0 5/	0
Total	217,205	183	23,113 6/	16,449	194,279	48,484
LIQUID SUGAR 7/						
	(wine gallons of 72 percent total sugar content)					
Cuba	7,970,558		5,980,958		1,989,600	
Dominican Republic	830,894		2,244		828,650	
British West Indies	300,000		0		300,000	

1/ 977 tons quota exempt sugar entered for livestock feed use and 320 for reexport from Cuba under Section 212 (4). 2/ These data include the following: (a) Domestic beet and mainland cane sugar estimated; (b) raw sugar from Hawaii and all sugar from the Republic of the Philippines and Cuba entered through April 12, 1957 as shown by quota clearance papers received in the Sugar Division by April 12, 1957; and (c) direct-consumption sugar from Hawaii and all sugar from Puerto Rico, the Virgin Islands and "other foreign countries" entered or certified for entry as of April 12, 1957. 3/ Includes raw sugar for direct-consumption from Cuba, 4,906; Philippines, 43; Puerto Rico, 10; Total, 4,959. 4/ Partly estimated. 5/ Applications being held pending availability of quota for Hong Kong total 6 tons. 6/ Under Section 212 (1) charges to quotas exclude the first 10 tons entered by each country listed and also by Dutch Guiana and Venezuela. In addition, 10 tons were entered by Canada under Section 212 (2).
7/ 3,703 gallons entered by United Kingdom under Section 212 (3).

Table 15.-Deliveries of Sugar by Primary Distributors by States, February 1957

State	Cane sugar refiners	Beet sugar processors	Importers of direct-consumption sugar	Mainland cane sugar mills	Total
	100-pound bags, refined equivalent				
NEW ENGLAND					
CONN	82842		4790		87632
ME	43167		600		43767
MASS	359527		21369		380896
N H	20544		200		20744
R I	35613		4500		40113
VT	13553		6000		19553
TOTAL	555246		37459		592705
MID ATLANTIC					
N J	501202		24250		525452
N Y	1233351	19 CR	85478		1318810
PENN	750922	2400	114185		867507
TOTAL	2485475	2381	223913		2711769
N CENTRAL					
ILL	419441	546139		11806	977386
IND	146164	43413		1	189578
IOWA	37397	77944		3400	118741
KAN	45074	46397			91471
MICH	173463	154475	7065	20	335023
MINN	18543	65159			83702
MO	172267	53666		1130	227063
NEBR	25106	68374		600	94080
N DAK	329	20519			20848
OHIO	418740	47126	8095	900	474861
S DAK	1473	17664			19137
WISC	85152	81975		6200	173327
TOTAL	1543149	1222851	15160	24057	2805217
SOUTHERN					
ALA	151799			6654	158453
ARK	62601	4000		4	66605
DEL	14472				14472
D C	42374		31200		73574
FLA	91956		122096	9733	223785
GA	264756		7602	700	273058
KY	102861		4979	715	108555
LA	226851			8094	234945
MD	232764		14387		247151
MISS	135483			1650	137133
N C	169633		48083		217716
OKLA	63056	11167			74223
S C	72606		10980		83586
TENN	166890		960		167850
TEXAS	391671	117921	3395	1	512988
VA	130808		39831	3	170642
W VA	68188		1220		69408
TOTAL	2388769	133088	284733	27554	2834144
WESTERN					
ARIZ	19396	13405		1000	33801
CALI	379945	327298	4614		711857
COLO	6595	44949			51544
IDAHO	2225	16227			18452
MONT	1398	18451			19849
NEV	3727	1645			5372
N MEX	7784	18110			25894
ORE	27889	35468			63357
UTAH	6348	26687			33035
WASH	37604	87905	5678		131187
WYO	667	5062			5729
TOTAL	493578	595207	10292	1000	1100077
GRAND TOTAL	7466217	1953527	571557	52611	10043912

Table 16.-Sugar: Prices, production, and stocks

Period	Prices (Gross) 1/					
	Raw cane		Refined cane, quoted wholesale			
	N.Y. duty paid	World fas, Cuba	New York	Gulf	Chicago-West	Pacific Coast
	Cents per pound					
1952-56 annual av.	6.14	3.51	8.68	8.56	8.57	8.63
1955 annual av.	5.95	3.24	8.59	8.50	8.49	8.53
1956 annual av.	6.09	3.48	8.77	8.60	8.58	8.75
1956						
April	6.02	3.31	8.66	8.55	8.55	8.68
May	6.03	3.36	8.75	8.55	8.60	8.75
June	6.00	3.36	8.75	8.55	8.60	8.75
July	6.11	3.40	8.75	8.55	8.60	8.75
August	6.10	3.34	8.75	8.55	8.53	8.75
September	6.09	3.24	8.75	8.55	8.50	8.75
October	6.29	3.24	8.83	8.62	8.57	8.75
November	6.33	3.92	8.95	8.75	8.70	8.79
December	6.37	4.77	9.10	8.90	8.85	9.10
1957						
January	6.35	5.83	9.10	8.90	8.85	9.10
February	6.10	5.80	9.10	8.90	8.85	9.10
March	6.18	6.17	9.10	8.90	8.85	9.10
12 month av.	6.16	4.14	8.88	8.69	8.67	8.86

Period	Prices (Gross) (continued) 1/			
	Refined beet, quoted wholesale			Refined, retail
	Eastern	Chicago-West	Pacific Coast	U.S. average
	Cents per pound			
1952-56 annual av.	8.48	8.37	8.53	10.47
1955 annual av.	8.39	8.29	8.43	10.42
1956 annual av.	8.52	8.38	8.65	10.57
1956				
April	8.46	8.35	8.58	10.52
May	8.55	8.40	8.65	10.52
June	8.55	8.40	8.65	10.58
July	8.55	8.40	8.65	10.58
August	8.48	8.33	8.65	10.58
September	8.45	8.30	8.65	10.58
October	8.45	8.37	8.65	10.62
November	8.65	8.50	8.69	10.66
December	8.74	8.65	9.00	10.72
1957				
January	8.75	8.65	9.00	10.86
February	8.69	8.65	9.00	10.96
March	8.65	8.65	9.00	
12 month av.	8.58	8.47	8.76	10.65 2/

Period	Production and month-end stocks, refined			
	Production		Month-end stocks	
	Cane sugar refiners	Beet processors	Cane sugar refiners	Beet processors
	1,000 short tons, raw value			
1952-56 monthly av.	501	150	258 3/	785
1955 monthly av.	509	150	245 3/	860
1956 monthly av.	528	163	281 3/	816
1956				
April	530	21	309	904
May	541	37	332	810
June	534	51	310	698
July	602	20	304	531
August	604	15	288	323
September	537	113	268	212
October	595	538	218	584
November	497	608	225	1,039
December	464	438	246	1,278
1957				
January	485	89	282	1,260
February	395	25	312	1,178
March 4/	452	5	301	1,056
12 month av.	520	163	283	823

1/ Quoted wholesale refined prices represent the current quotations of cane refiners and beet processors even though orders sometimes are taken on a day to day basis at a lower price and allowances in specific areas are being made. 2/ 11 month average. 3/ Over-quota stocks at the end of the year included. 4/ Preliminary.